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ABSTRACT

This instructor's guide and student activity packet (together with a slide/tape presentation not available here) comprise a module for the postsecondary office occupations education competency area of preparing and distributing notices for meetings. Modules for other competency areas are available separately. The purpose stated for the module is to help students learn the skills needed in preparing for business meetings. The instructor's guide includes an introduction, performance objectives, special notes to instructor, time and facilities, suggestions for discussion, optional student activities, suggested evaluation criteria, keys to student activities, the narrative for the slide/tape presentation, and a list of resources and references. Contents of the student activity packet include an introduction, performance objectives, necessary resource materials, directions for completing the activities provided, a student checksheet for taking notes during the slide/tape presentation, and the activities to be completed in order to master the competencies on which the module is based. (YLB)

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ED222726

OFFICE OCCUPATIONS

PREPARING AND DISTRIBUTING NOTICES FOR MEETINGS

Audiovisual Package

Instructor's Guide
Student Activity Packet

Prepared by Diane E. Johnson

CE 034193

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PREPARING AND DISTRIBUTING NOTICES FOR MEETINGS

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INTRODUCTION

This module, made up of a slide/tape presentation and accompanying printed materials, was developed as a result of a proposal funded by the Texas Education Agency to the Occupational Curriculum Laboratory at East Texas State University. Based on the results of a needs assessment of selected postsecondary office occupations instructors from across the state of Texas, this and several other modules were developed to provide instructional materials in competency areas that require formal classroom training. Selected postsecondary office occupations instructors assisted in the development, field review, and evaluation of the final product.

Included in each slide/tape package are a set of full-color slides, a script, a cassette tape, an instructor's guide, and a student activity packet. Each package includes an instructor's guide with general instructions for use by an individual or in a group setting, the slide/tape presentation, and specific instructions on how to use the materials in a particular package. The specific instructions section contains solutions for the activities completed by the students and suggestions for evaluation of the work produced.

The student activity packet consists of a section on information the student must know in order to complete the activities, any necessary resource materials, and the activities to be completed in order to master the competencies on which the module is based.

All of the materials in these modules have been developed with student needs and interests in mind and are designed with the flexibility for use as supplementary or primary teaching aids in many of the office occupations classes. As a result, the students should find the material practical and job-related.

ACKNOWLEDGMENTS

We extend special thanks to the following committee members and their employers for their cooperation in reviewing, evaluating, and testing the materials developed through this project:

Business Advisory Committee

Berta Aizen, Manager, Secretaries of Dallas
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Naomi Phelps, Personnel Consultant, Office Mates 5
Dr. Christine Smart, Consultant, Texas Education Agency
Becky Stoker, Division Manager, Temporaries of Dallas, Inc.
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Georgia Weathers, Texas State Technical Institute, Amarillo
Annie Williamson, Lamar University at Orange
Freddie Wilmoth, Bee County College

In addition to these specific individuals, selected students at Bee County College, Kilgore College, and South Plains College have tested these materials in their draft form and have provided valuable input for assuring that the final product be as realistic and job-oriented as possible.

Appreciation is also given to the following businesses and institutions which allowed our writers and photographers access to their facilities. It is through

their cooperation that the slides which accompany these packages show actual office settings:

Brookhaven College

Office Occupations Laboratory

East Texas State University

Business Education Department

Xerox Corporation, Dallas

Sun Production Company, Dallas

Finally, special appreciation is extended to Donna Henson and Joyce Johnson of East Texas State University for their input in the initial development of these materials.

INSTRUCTOR'S GUIDE

PREPARING AND DISTRIBUTING NOTICES FOR MEETINGS

INSTRUCTOR'S GUIDE

GENERAL INSTRUCTIONS

Equipment Needed

Before using this presentation, make sure that arrangements have been made to have the following equipment available: a projector, a projection screen, and a cassette recorder/player.

Make sure that all equipment is working properly.

Preparations Before Class

1. Preview the slide/tape presentation and determine how it will be used in your class.
2. Plan short but relevant introductions to tell students what to look for in the slide/tape presentation.
3. Allow enough time to show the presentation in its entirety.
4. If you use handouts, be sure they are distributed after the presentation.

Procedures for Group Setting

1. Choose a point in the lesson where the slide/tape presentation will have the greatest impact.
2. Make sure the seating arrangements allow every student to see the screen.
3. After showing the slide/tape presentation, ask students to give highlights in their own words.
4. If necessary, show the presentation or parts of it again to emphasize points important to successful completion of the activities.
5. After showing the presentation, make arrangements for students to use it on an individual basis.

Procedures for Individual Setting

1. Make sure space and equipment are available.

2. Check equipment to make sure it is working properly.

3. Demonstrate the procedures for using the equipment.

4. Have students view the slide/tape presentation as many times as necessary to understand the information given.

Instructions for Using Slides and Cassette Tapes

1. Pick up each slide by the frame so that you do not touch the film.

2. Arrange the slides in the slide tray in sequential order with the slide number in the upper right corner facing you.

3. Insert the cassette tape in the recorder/player.

4. Rewind the cassette tape to be sure it will start at the beginning.

5. Turn on the slide projector. The first slide should be projected on the screen.

6. Start the cassette player.

7. Depress the advance button at the sound of the "beep" if you are using the audible advance.

(NOTE: Review the above procedures with those students who will be using the package individually.

Student Checksheets

Student checksheets provide a convenient means for students to take notes while viewing the slide/tape presentation. The points identified on the student checksheets are those the student will have to be familiar with in order to complete the activities provided.

Resource Sheets

Resource sheets contain information essential to the activities and serve as reinforcement for the competency requirements covered by the slide/tape presentation. Students should use the resource sheets as instructed in each student activity packet.

Activity Sheets

Activity sheets are working papers for students. Students are instructed to use them when completing certain activities.

PREPARING AND DISTRIBUTING NOTICES FOR MEETINGS

INSTRUCTOR'S GUIDE

SPECIFIC INSTRUCTIONS

Introduction to Slide/Tape Presentation

Preparing and Distributing Notices for Meetings is an audiovisual aid developed to help students learn the skills needed in preparing for business meetings.

This slide/tape presentation consists of 45 full-color slides, a cassette tape, an instructor's guide, and a student activity packet that could be used as primary or supplementary instructional tools in office/secretarial procedures and business communications classes.

Script

A description of each slide and its narration can be found at the end of the Specific Instructions.

Time and Facilities

Approximately 15 to 20 minutes of one class session should be set aside for introduction and presentation of the slide/tape, which can be shown in any room that can be sufficiently darkened or that has individual carrels equipped with slide carousels and cassette tape recorders. In addition, students should be able to complete the five activities in approximately 4 to 6 hours.

Suggested Class Discussion (for use in a group setting)

Before the slide/tape is presented, the necessity and importance of writing notices of meetings should be discussed. The instructor may want to stress the value of a secretary who has the ability to recognize the need for meeting preparations and to follow them through to the time of the meeting.

After the slide/tape has been presented, the steps in writing and distributing the notices should be reviewed. Some attention should be given to the differences between preparing for large and small meetings. The instructor may also want to emphasize that while telephone notification may at times be used, some form of written follow-up is always desirable.

Suggested Student Activities

Five activities are provided in the Student Activity Packet. These activities are designed to reinforce the information presented on the slide/tape presentation and to give students an opportunity to apply their knowledge of writing and distributing notices for meetings.

The following suggestions for additional activities may be used with students who need further skill refinement in this competency.

1. Students could prepare or update a mailing list from a source other than the card file, e.g., looseleaf pages.

2. Students could prepare a meeting notice and/or agenda for a meeting with a different schedule than that covered in the student activities.

3. Students could divide into pairs for work on the activities, each member of the pair serving as employer to the other. In this way, they would critique each other's work and would view the preparation process from the employee's viewpoint as well as from the viewpoint of the employer.

Suggested Evaluation Criteria

The following is a checklist that can be used when evaluating the student's successful completion of this packet. This checklist is not intended as a method of grading but merely as a means of determining whether or not the student has mastered the competencies presented in this package.

1. Completion time for activities

   a. Completion time less than suggested time limits _____

   b. Completion time within suggested time limits _____

   c. Completion time greater than suggested time limits _____

2. Activity 1--Calendar Notations

   a. Meeting date marked (Dec. 10) _____

   b. Mailing date marked (Nov. 19 or 20) _____

   c. Date for final count marked (Dec. 5) _____

   d. Date on which luncheon arrangements must be confirmed marked (Dec. 5) _____

3. Activity 2--Mailing List

   a. All cards typed _____

   b. All cards accurate _____

   c. Cards placed in alphabetical order _____

4. Activity 3--Meeting Notice

   a. Notice includes necessary information _____

   b. Notice grammatically correct _____

   c. Notice typed accurately (errors neatly corrected) _____

   d. Notice placed attractively on stationery _____

5. Activity 4--Agenda and Envelopes

   Agenda

      a. Agenda includes necessary information _____

      b. Agenda placed attractively on the page _____

      c. Agenda typed accurately (corrections neatly made) _____

   Envelopes

      a. Envelope prepared for each member _____

      b. Addresses placed correctly _____

      c. Appearance of envelopes neat _____

      d. Addresses typed accurately _____

6. Activity 5--Confirmations

   a. Cards marked with "yes" or "no" _____

   b. List prepared with name and phone number of those attending _____

   c. List neat and accurate _____

KEY

Activity 1

NOVEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	must attend for KPA 19 <-> OR <-> 20		21	22	23	24
25	26	27	28	29	30	

DECEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3	4	Final Exam KPA 5 Continue Lecture	6	7	8
9	KPA 10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

KEY

Activity 2

All cards should follow one of the following formats:

Mr. James Culver **TEA
Terramar Consultants
445 Campbell Center
Dallas, TX 72512

(214) 748-8192

Culver, James (Mr.) **TEA

Mr. James Culver
Terramar Consultants
445 Campbell Center
Dallas, TX 72512

(214) 748-8192

KEY

Activity 2
(continued)

After all cards have been typed and corrected, they should be arranged in the following alphabetical order:

(1) Alice Adams
Voss International Corp.
9011 Westimer
Houston, TX 77001

(713) 785-5352

(2) James Andrew
Associated Engineers
41137 Main Place
Austin, TX 78101

(512) 426-8888

(3) Julie Andrews
Core Laboratories Inc.
7606 Stemmons Frwy.
Dallas, TX 72513

(214) 526-7083

(4) James Culver
Terramar Consultants
445 Campbell Center
Dallas, TX 72512

(214) 748-8192

(5) Raymond Goodson
Datrum Enterprises
1000 Main
Tyler, TX 76772

(214) 524-7018

(6) Bobbie J. Hilton
Sundry Consultants
3333 Thomasson
Houston, TX 77020

(713) 655-6167

(7) Margaret Hixson
Hixson Associates
3576 Crawford
Houston, TX 77021

(713) 633-0110

(8) E. L. Jacobs
Jacobs Engineering
Texas National Bank Building
Irving, TX 75206

(214) 437-5704

(9) Dianne Jameson
Jameson Laboratories, Inc.
444 Commerce
Houston, TX 77020

(713) 641-6366

(10) John B. Lawson
Magler Engineers
2000 W. Thornton
Fort Worth, TX 76177

(817) 476-3127

(11) Frank Perez
Perez Consulting Co.
1800 W. Morse
San Antonio, TX 79172

(512) 539-8246

(12) Betty J. Pippin
Pippin Associates
3200 West Freeway
Fort Worth, TX 76178

(817) 239-8000

(13) Steve Southern
Southern Associates
1000 E. Eighth Street
San Antonio, TX 78512

(512) 339-8927

(14) Tish Tidewater
Tidewater Consultants
1300 Central Expressway
Dallas, TX 72511

(214) 528-0928

(15) Alan Voorhoes
Diverse Engineers
1777 Gaston Avenue
Dallas, TX 72512

(214) 372-9900

November 20, 19--

Dear Texas Engineering Association Members:

A special meeting of the Texas Engineering Association will be held Monday, December 10, 19-- at the Shamrock Hotel (Central Freeway). The short business meeting will begin at 11 a.m. in Conference Room B and will be followed by a luncheon at 12 noon in the Oasis Room. The cost of the luncheon is $7.00. A special presentation by the Solar Energy Foundation will begin at 1:30 p.m. in Conference Room B.

Please return your reservation by December 5, 19--. You must cancel reservations by 9 a.m. on December 10, 19--, or be billed for the luncheon.

If you cannot attend, be sure to let me know as soon as possible.

George Lange

ff

KEY
Activity 3

NOTE: This is only an example of the notice on half-size stationery. Students' notices will not be the same but should include all the necessary information presented.

KEY

Activity 4

TEXAS ENGINEERING ASSOCIATION
Monday, December 10, 19--
Shamrock Hotel (Central Freeway)

AGENDA

11 a.m.--12 noon (Conference Room B)

Call to Order--President Lange

Minutes--November Meeting--Raymond Goodson

Treasurer's Report--Betty J. Pippin

Committee Reports: Steve Southern
James Andrew
Tish Tidewater
Dianne Jameson

Unfinished Business

New Business

Adjournment

12 noon--(Oasis Room)
Luncheon

1:30 p.m.--(Conference Room B)

"The Utilization of Solar Energy in Business"
by the Solar Energy Foundation

KEY

Activity 4*

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Alice Adams
Voss International Corp.
9011 Westimer
Houston, TX 77001

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Raymond Goodson
Datrum Enterprises
1000 Main
Tyler, TX 76772

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

James Andrew
Associated Engineers
41137 Main Place
Austin, TX 78101

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Bobbie J. Hilson
Sundry Consultants
3333 Thomasson
Houston, TX 77022

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Julie Andrews
Core Laboratories, Inc.
7606 Stemmons Frwy.
Dallas, TX 72513

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Margaret Hixson
Hixson Associates
3576 Crawford
Houston, TX 77021

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

James Culver
Terramar Consultants
445 Campbell Center
Dallas, TX 72512

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

E. L. Jacobs
Jacobs Engineering
Texas National Bank Bldg.
Irving, TX 75206

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Dianne Jameson
Jameson Laboratories, Inc.
444 Commerce
Houston, TX 77020

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Steve Southern
Southern Associates
1000 E. Eighth Street
San Antonio, TX 78512

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

John B. Lawson
Magler Engineers
2000 W. Thornton
Fort Worth, TX 76177

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Tish Tidewater
Tidewater Consultants
1300 Central Expressway
Dallas, TX 72511

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Frank Perez
Perez Consulting Co.
1800 W. Morse
San Antonio, TX 79172

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Alan Voorhoes
Diverse Engineers
1777 Gaston Avenue
Dallas, TX 72512

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Betty J. Pippin
Pippin Associates
3200 West Freeway
Fort Worth, TX 76178

*Addresses are shown without titles preceding the names of recipients. Students may use titles if desired; however, since the sex of Bobbie J. Hilton and E. L. Jacobs is not discernible from the first names, titles should be omitted on these two names.

KEY

Activity 5

All file cards should have either "yes" or "no" written beside the name.

List of "yes" responses for December 10 meeting

Alice Adams (713) 785-5352

James Andrew (512) 426-8888

Julie Andrews (214) 526-7083

Bobbie J. Hilton (713) 655-6167

Margaret Hixson (713) 633-0110

E.L. Jacobs (214) 437-5704

John B. Lawson (817) 476-3127

Frank Perez (512) 539-8246

Steve Southern (512) 339-8927

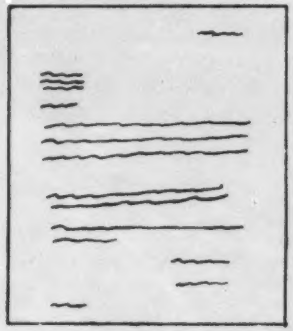
Tish Tidewater (214) 528-0928

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
1	Focus/Synchronize Slide	OCL Logo
2	Title Slide	Preparing and Distributing Notices for Meetings
3	Illustration STOP	Before beginning this slide/tape presentation, stop the recorder and locate the Student Checksheet in your Student Activity Packet. This checksheet provides a means of taking notes on the parts of this presentation that you will need to know in order to complete the activities.
4	Photo Joy Landy in her office	Meet Joy Landy, personnel director of Landy Enterprises. Because she is an administrator, Ms. Landy's work involves frequent personal contact with the employees of Landy Enterprises and with clients or others outside the organization. Quite often her business is conducted with groups of people, so she spends a great deal of time in meetings.
5	Photo Meeting with seven to ten people Photo National Conference in session	These meetings range from small staff conferences to national conferences attended by hundreds of representatives.
6	Photo Jim Cunningham at desk with pen in hand.	Jim Cunningham is secretary to Joy Landy. He contributes to her success by knowing when and how to relieve Ms. Landy of routine, time-consuming duties.
7	Photo Jim at desk writing or composing at the typewriter.	Taking care of the preparations for meetings is one important way in which Jim is helpful. As a part of the preparations, Jim writes notices for meetings and distributes the notices to members and guests.
8	Photo Joy in conversation with Jim. Jim has a pen taking notes.	Today Joy Landy asks Jim to prepare a notice for a special meeting of the Regional Personnel Association which is to be held on Wednesday, August 22, at Landy Enterprises, in Conference Room A. A presentation by the Lowell Consulting Agency is planned for 11 a.m. to 12 noon. A luncheon is to be in the Labarba Room at 12 and will be followed by a short business meeting at 1:15. The cost of the luncheon is $4.75.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
9	Illustration INITIATIVE: the ability to see what needs to be done and to follow through.	Jim is an able and enthusiastic secretary, and he knows that using his own initiative in writing the notice and following through with its distribution will free Ms. Landy of much of the routine preparation for this meeting.
10	Illustration Calendar showing Wednesday, August 22, marked for meeting Friday, August 3, marked for mailing date Wednesday, August 1, marked for preparing notices	In preparing for this meeting, the first step Jim takes is to mark his calendar. He marks the date of the meeting, and he marks reminders for himself to prepare and to mail notices. He makes the calendar notations far enough ahead of the meeting date to provide himself time for writing, typing, duplicating, and mailing the notices. Since this is a special meeting, Jim plans for the notices to be received by members two weeks in advance of the meeting date. For regular meetings, he allows three to five days' advance notice.
11	Illustration MAILING LIST Regional Personnel Association Name / Address / Telephone Number Joe Andrews — Data Per, 600 Congress Ave., Austin, TX 78101 — (512)787-3500 Ellen Blye — Personnel Consultants, 2400 Stemmons, Dallas, TX 72512 — (214)526-0028	The second step Jim takes in preparing notices is to prepare or consult a mailing list of the names, addresses, and telephone numbers of those who will be attending the meeting.
12	Photo Secretary using addressing machine	There are several ways in which mailing lists may be compiled. Addressing machines are often used if the number of persons to be contacted is large or if mailing is frequent. Addressing machines range from a memory typewriter that is programmed for the names and addresses of recipients and will, by dialing the correct program, type the addresses on mailing labels, to computers that are programmed with the correct information and will also produce a printout on mailing labels.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
13	Illustration Loose-leaf notebook opened, showing name and address listing	Some secretaries maintain mailing lists in loose-leaf form.
14	Photo Jim typing 3 x 5 inch file card Illustration of 3 x 5 card Mr. Joe Andrews Data Per 600 Congress Ave Austin, TX 78101 (512)787-3500	For this mailing list, Jim prefers to use 3" x 5" cards. He types each name, address, and telephone number on a separate card, underlining the last name as a filing aid.
15	Illustration of 3 x 5 card Mr. Joe Andrews *RPA Data Per 600 Congress Ave. Austin, TX 78101 (512) 787-3500	In the upper right hand corner Jim types "RPA" to indicate the organization represented.
16	Illustration of several cards Mr. Michael Clawson *RPA Ms. Ellen Blye *RPA Mr. Joe Andrews *RPA Data Per 600 Congress Ave. Austin, Texas 78101 (512) 787-3500	After typing cards for all members, Jim arranges the cards in alphabetical order, for easy reference. To do this, Jim looks first at the last names of the members. If the last names of two or more members are the same, Jim uses their first names to determine the order in which the cards will be placed in the file.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
17	Illustration Dear _____: We are updating our mailing list and request your help. If your address has changed within the last year, will you please let us know . . .	In order to keep the mailing list up to date, once a year Jim requests the members to report their current addresses. Information on changed addresses may be obtained by individual letter . . . .
18	Illustration The above address is shown in our records. Please indicate any changes below. _____ _____	or by specialized forms.
19	Illustration Double postcard	For updating his mailing lists, Jim prefers the convenience of double postcards. He types his request on one postcard and addresses it to the member. On another postcard, he leaves space for the reply and self addresses the card to Landy Enterprises. Before mailing, he staples the two cards together so that the recipient can easily detach the self-addressed card and use it to respond to Jim's request.
20	Photo Jim replacing original card with new one. 31	When a member reports a change of address, Jim replaces the member's original file card with one indicating the new address. 32

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
21	Illustration Handwritten note with day, date, time, place underlined 	On the day before the notices need to be mailed, Jim writes the meeting notice. He is careful to indicate the day, the date, the time, the place, and the purpose of the meeting. After writing the notice, Jim carefully reads what he has written to be certain that it is grammatically correct and that he has used correct punctuation and spelling.
22	Photo Jim proofreading at typewriter	Jim then types the notice and proofreads the typed copy to make sure that all of the information is correct.
23	Photo Jim giving notice to Joy Landy	He then gives the notice to Ms. Landy for her final approval.
24	Photos Jim typing notice on a spirit master or stencil Jim duplicating the notice on a spirit duplicator or a stencil duplicator	After Ms. Landy gives her final approval, Jim types the notice on a sheet of paper to be used on a dry copy machine, on a spirit master, or on a stencil and then duplicates enough copies so that each member will receive one.
25	Illustration Notice typed on half-size stationery Notice typed on postcard	If the notice does not require too much space, Jim uses either half-size stationery or postcards.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
26	Photo Jim putting copy of notice in file folder.	To maintain an accurate record of what occurs in the office, Jim always keeps a file copy of the notice and the date of its mailing.
27	Illustration AGENDA: A schedule of business to be conducted during the meeting	For some meetings Jim is able to prepare an agenda to be sent with the meeting notice. Having a copy of the agenda, which is a schedule of the business to be conducted during the meeting, enables members to come to a meeting prepared to participate in the discussion and confidently take part in the decision-making process.
28	Illustration AGENDA 11 a.m.—12 noon (Conference Room A) Presentation--Lowell Consulting Agency 12 noon Luncheon (La Salle Room) 1:15—2:15 (Conference Room A) Call to order--Joy Landy, Pres. Minutes--July meeting--David Gilmore Treasurer's Report--Dianne Fuller Committee Reports: Robert Talmedge Ray Stevens Rhonda Stanford Cheryl Stone Unfinished business New business Adjournment	For this particular meeting, Jim is able to prepare an agenda. He first types it in rough draft form. Notice that, in addition to the special presentation and the luncheon, he has included: call to order, reading of minutes, reports of officers, reports of committees, unfinished business, new business, and adjournment.
29	Photos Jim giving Joy the agenda for final approval | Jim duplicating the agenda	Jim gives the rough draft of the agenda to Ms. Landy for final approval. He then types, proofreads, and corrects the agenda before duplicating enough copies for the members.

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
30	Photo Jim typing original with one carbon	On some occasions, Ms. Landy asks Jim to prepare only one copy and one carbon of the agenda. In this case, the agenda would be for her use only.
31	Photo Jim typing envelopes from mailing list on desk	Now that the notices and agendas are ready, Jim prepares to mail them. He refers to his mailing list and types an envelope for each member.
32	Photo Placing envelopes in outgoing mail	Jim mails the notices and agendas approximately two weeks before the meeting date so that they will be received far enough in advance of the meeting to allow the members to set aside enough time to attend the meeting.
33	Photo Jim telephoning and writing on card	To make last minute arrangements, Jim must know how many members will actually attend the meeting. In order to determine this number, three days before the meeting date Jim telephones each member who has not yet responded. He records the response by writing "yes" or "no" on the mailing list beside the name of the member.
34	Photo Jim telephoning while looking at the list of confirmations	Jim is then able to call a restaurant or a caterer and make the necessary arrangements for the luncheon. When Jim telephones the caterer for this luncheon, he must know how many people will be in attendance and whether any special seating arrangements must be made. At the same time, Jim must verify the time of the luncheon, the room in which it will be held, and the menu that is planned.
35	Photo Jim greeting arriving members	When the date for the meeting arrives, Jim will experience the satisfaction of seeing all go well and of knowing that his efficient preparations have once again contributed to a successful meeting at Landy Enterprises.
36	Illustration LET'S REVIEW	Knowing when and how to prepare and distribute notices for meetings is a skill which you, too, will find helpful. So let's review the steps you will take as you perform this vital function.
37	Photo Jim making calendar notations	1. When you are first informed of the meeting, make calendar notations to remind yourself to write and distribute notices.

37

38

SLIDE NO.	SLIDE DESCRIPTION	NARRATIVE
38	Photo Jim typing names on file cards	2. As soon as possible, prepare a mailing list of the names, addresses, and phone numbers of those who will be attending the meeting.
39	Photo Repeat slide #20 Repeat slide #23a	3. At least two weeks before the meeting date, compose and type the notice. Include the day, the date, the time, the place, and the purpose of the meeting.
40	Photo Repeat slide #27	4. At the same time, prepare an agenda if one is required.
41	Photo Repeat slide #28b	5. Then, verify the number of members and duplicate the appropriate number of notices and agendas. Remember that for a small message you may place the notice on either half-size stationery or post cards.
42	Photo Repeat slide #31	6. Mail the notices and agendas as soon as they have been duplicated.
43	Illustration Mailing list with "yes" or "no" written beside each name	7. Then, three days before the mailing date, verify the number of persons who will attend.
44	Photo Repeat slide #33	8. Finally, verify the arrangements for a meal if one is included in the meeting. The date by which this final verification must be made will be given to you by the caterer or by the restaurant manager.
45	Illustration Certificate of mastery	Preparing and distributing notices for meetings is one of the essential skills in today's business world. Knowing how to do this job well adds to your value as an office employee.
46	Credits Slide	

REFERENCES

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STUDENT ACTIVITY PACKET

PREPARING AND DISTRIBUTING NOTICES FOR MEETINGS

STUDENT ACTIVITY PACKET

Objective

To learn to develop and follow through with appropriate notifications for business meetings.

Introduction

Today's business executive spends a great deal of time in meetings. As a secretary, you will be valuable if you are able to relieve your employer of some of the preliminary preparations for meetings. One skill which you will often use for this purpose is the preparation and distribution of meeting notices.

Purpose

When you have completed the exercises in this packet, you will know how to plan, prepare, and distribute meeting notices.

Materials

*Student Checksheet for use with slide/tape presentation
*Sample Mailing List Cards
*Sample Notice on Half-Size Stationery
*Sample Agenda
*Sample Envelope
*Resource sheets for Activities 1-5
*Activity sheets for Activities 1, 3, and 4
Dictionary or word division manual
Clerical or secretarial reference manual
Scissors
Typewriter
Typing paper
3" by 5" file cards (16)
Correction materials
Pen or pencil
Rubber bands or paper clips
**16 envelopes (3 3/4" by 6 1/4")

*These materials are provided as a part of this activity packet.

**The student may wish to substitute envelopes for the forms provided in Activity 4.

Directions

This packet contains five activities. For each activity there are one or more resource sheets which contain instructions and needed background information. Each resource sheet is also dated; this date refers to reminders marked on the calendar prepared in Activity 1. Because each activity builds upon the work in the previous activity, they should be completed in their numbered order. As you work on each activity, follow these steps:

1. Locate the activity sheets and the resource sheets you will need.

2. Read the instructions carefully.

3. Assemble the materials you will need.

4. Complete the work called for in the activity.

5. Check over your work for completeness and accuracy.

When all activities have been completed, submit them to your instructor for evaluation.

(NOTE: Activity 3 requires a rough draft to be completed before the final copy is prepared. In this case, when you have completed your rough draft, submit it to your instructor for approval before preparing the final copy.)

STUDENT CHECKSHEET

(To Be Used With Slide/Tape Presentation)

This sheet is provided as a convenient means of taking notes during the slide/tape presentation. The answers to the questions presented here will be useful when completing the activities that accompany this presentation.

1. When you first learn that you will need to write and distribute notices for a meeting, what notations will you make on your calendar?

   a.

   b.

   c.

   d.

2. How far in advance of a meeting date should the notices and agendas be sent to members?

3. After you have marked your calendar, what is your next step toward preparing the notices?

4. Explain three forms in which you could maintain a mailing list for meeting notices.

   a.

   b.

   c.

5. How often should a mailing list be updated?

6. Name three methods by which a mailing list can be updated.

   a.

   b.

   c.

7. What information should be included on the meeting notice?

   a.

   b.

   c.

   d.

   e.

8. What is an agenda?

9. If your employer asks you to prepare an agenda, what items will you most likely include?

   a.

   b.

   c.

   d.

   e.

   f.

   g.

10. How many days in advance of a meeting should you verify the number and names of participants?

11. How will you determine the final number of persons who will attend a meeting?

12. When finalizing arrangements for a luncheon, what information must be verified?

    a.

    b.

    c.

    d.

    e.

SAMPLE

FILE CARDS FOR MEMBERS

Either of these formats is acceptable for preparing mailing list cards.

Mr. Randall J. Johnson **RPA
Personnel Administrator
D/FW Airport Board
D/FW, TX 76705

(214) 574-6039

Johnson, Randall J. (Mr.) **RPA

Mr. Randall J. Johnson
Personnel Adminstrator
D/FW Airport Board
D/FW, TX 76705

(214) 574-6039

August 3, 19--

Dear Mr. Johnson:

A special meeting of the Regional Personnel Association will be held on Wednesday, August 22, 19-- at Landy Enterprises, Conference Room A. A presentation by the Lowell Consulting Agency is scheduled from 11 a.m. to noon. A luncheon is planned for 12 noon in the La Salle Room and will be followed by a short business meeting at 1:15. The cost of the luncheon is $4.75.

Please return your reservation by August 19, 19--. You must cancel reservations by 10 a.m. on August 22, 19--, or be billed for the luncheon.

If you cannot attend, be sure to let me know as soon as possible.

George Lange

jj

SAMPLE

NOTICE ON HALF-SIZE STATIONERY

SAMPLE

AGENDA--REGIONAL PERSONNEL ASSOCIATION

REGIONAL PERSONNEL ASSOCIATION
Wednesday, August 22, 19--
Landy Enterprises

AGENDA

11 a.m.--12 noon (Conference Room A)
Presentation--Lowell Consulting Agency

12 noon
Luncheon--(La Salle Room)

1:15--2:15 (Conference Room A)
Call to order--Joy Landy, President

Minutes--July Meeting--David Gilmore

Treasurer's Report--Dianne Fuller

Committee Reports:

Robert Talmedge
Ray Stevens
Rhonda Standford
Cheryl Stone

Unfinished Business

New Business

Adjournment

SAMPLE

ENVELOPE

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

Mr. David L. Johnson
1437 Lee Street
Greenville, TX 75401

RESOURCE SHEET

Activity 1

November 12

You are secretary to Mr. George Lange, president of the Texas Engineering Association. Mr. Lange is out of the office today. When you arrive in your office, you find on your desk a note telling you of a special meeting of the Texas Engineering Association and a list of members who will attend the meeting.

Use the activity sheet for Activity 1 to mark your calendar in preparation for this meeting.

RESOURCE SHEET

Activity 1

A special meeting of the Iowa Engineering Association is to be held on December 10,19-- at the Shamrock Hotel (the one off Central Freeway.

11 a.m - Business Meeting
12 noon - Luncheon (Price $7.00)

Special Presentation by The Solar Energy Foundation at 1:30 p.m.

Conference Room B - Business Meeting and Special Presentation

Oasis Room - Lunch

Please take appropriate action.

J Lange

ACTIVITY SHEET

Activity 1

NOVEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

DECEMBER

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

RESOURCE SHEET

Activity 2

November 15

You are ready now to prepare the mailing list which you will use for sending out notices of Mr. Lange's December 10 meeting. Prepare your mailing list on 3 x 5 file cards by referring to the sample page in the front of your Student Activity Packet.

After the cards have been typed, arrange them in alphabetical order according to the last names of the members and fasten the cards with a paper clip or a rubber band.

RESOURCE SHEET

Activity 2

These are the names of the members who will be attending the meeting on December 10.

James Culver
Terramar Consultants
445 Campbell Center
Dallas, TX 72512
(214) 748-8192

Julie Andrews
Care Laboratories Inc.
7606 Stemmons Fwy
Dallas, TX 72513
(214) 526-7083

E. L. Jacobs
Jacobs Engineering
Texas National Bank Building
Irving, TX 75206
(214) 437-5704

Alice Adams
Vess International Corp.
9011 Westimer
Houston, TX 77001
(713) 785-5352

Steve Southern
Southern Associates
1090 E. Eighth Street
San Antonio, TX 78512
(512) 339-8927

James Andrew
Associated Engineers
41137 Main Place
Austin, TX 78101
(512) 426-8888

Raymond Goodson
Datrum Enterprises
1900 Main
Tyler, TX 76772
(214) 524-7018

Dianne Jameson
Jameson Laboratories, Inc.
444 Commerce
Houston, TX 77020
(713) 641-6366

Bobbie J. Hilton
Sundry Consultants
3333 Thomasson
Houston, TX 77022
(713) 655-6167

Betty J. Pippin
Pippin Associates
3200 West Freeway
Fort Worth, TX 76178
(817) 239-8000

John B. Lawson
Magler Engineers
2000 W. Sheriton
Fort Worth, TX 76177
(817) 476-3127

Margaret Hixson
Hixson Associates
3576 Crawford
Houston, TX 77021
(713) 633-0110

Alan Voorhees
Dinnes Engineers
1777 Easton Ave.
Dallas, TX 72512
(214) 372-9900

Frank Perez
Perez Consulting Co.
1800 W. Main
San Antonio, TX 79172
(512) 539-8246

Jish Tidewater
Tidewater Consultants
1300 Central Expressway
Dallas, TX 72511
(214) 528-0928

RESOURCE SHEET

Activity 3

November 19

Consult your calendar for today (prepared in Activity 1) and take the appropriate action. Refer to Mr. Lange's note for Activity 1 for the information you will need. You may also refer to the sample meeting notice at the front of your Student Activity Packet for an example.

1. Prepare a rough draft of the notice.

2. Check what you have written to be sure you have included all of the essential information.

3. Submit the rough draft to your instructor for approval. (Remember that when you are on the job, you will be requesting your employer's final approval at this point.)

4. After securing final approval, type the notice on a plain sheet of paper to be used on a copy machine, on a spirit master, or on a stencil and duplicate copies on the half-size stationery provided.

TEXAS ENGINEERING ASSOCIATION

P. O. BOX 3333
DALLAS, TX 75121

ACTIVITY SHEET

Activity 3

TEXAS ENGINEERING ASSOCIATION

P. O. BOX 3333
DALLAS, TX 75121

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RESOURCE SHEET

Activity 4

November 19

As Mr. Lange often does, he is depending on you to take care of some of the other preliminary preparations for this meeting. Today he hands you a roughed-out agenda and asks you to see that each member receives a copy along with the notice of the meeting.

Following Mr. Lange's instructions, type the agenda and duplicate copies. Then, using the sample envelope as a guide, prepare envelopes for mailing the notices and agendas to members.

Cut out the envelopes provided on the activity sheets and type them in an acceptable form. After the envelopes have been typed, paper clip each envelope to a copy of the notice and the agenda.

Please type a duplicate. Use a spirit master.

RESOURCE SHEET

Activity 4

Agenda
Texas Engineering Association
Shamrock Hotel

11 a.m. to 12 noon - Conference Room B
Call to Order -- President Lange
Minutes -- November Meeting -- Raymond Godwin
Treasurer's Report -- Betty J. Pippin
Committee Reports:
Steve Southern
James Andrew
Jack Tidewater
Dianne Jameson
Unfinished Business
New Business
Adjournment
12 noon -- Oasis Room (Lunch)
1:30 -- Conference Room B
"The Utilization of Solar Energy in Business by the Solar Energy Foundation

ACTIVITY SHEET

Activity 4

TEXAS ENGINEERING ASSOCIATION
P. O. BOX 3333
DALLAS, TX 75121

TEXAS ENGINEERING ASSOCIATION
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DALLAS, TX 75121

RESOURCE SHEET

Activity 5

December 5

Consult your calendar for today and take the necessary action. You will again use the cards prepared in Activity 2.

1. Refer to the list of persons from whom you have received written responses. On the appropriate cards (prepared in Activity 2) write "yes" beside the names of the persons who have indicated they will attend.

2. Type a list of those who responded "yes." Include phone numbers.

(NOTE: When you are employed, you may find that your firm likes to have you phone all members who plan to attend and remind them of the meeting a day or two in advance.)

RESOURCE SHEET

Activity 5

Two weeks after mailing the notices you receive the following confirmations.

James Andrew
John B. Lawson
Frank Perez
Fish Tidewater
Alice Adams
Steve Southern
Julie Andrews
E. L. Jacobs
Margaret Hixson
Bobbie J. Hilton